



Documentation & Training Model for Employee Success

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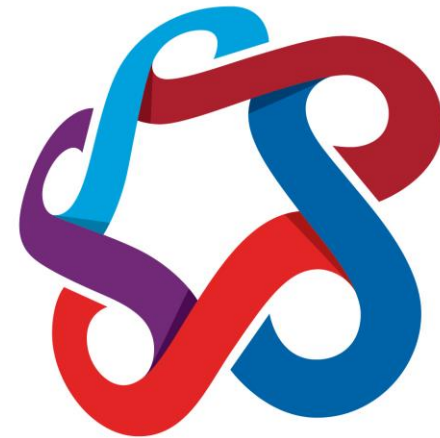
Agenda

- **Introduction to SAIT and the Office of the Registrar**
- **Process Documentation**
 - Evolution
 - Lessons Learned
- **Training**
 - The “Champion” Model
- **Connection to Employee Success**
- **Q&A**

Introduction

SAIT

- Polytechnic post-secondary institution in Calgary, AB
- Offers diverse programming in technical, business and creative fields, with a balance of skills-based and theoretical learning
- 3rd-largest post-secondary in Alberta with a 1:20 faculty to student ratio
- Over 50,000 people take courses at SAIT in a given year
- ERP: Banner by Ellucian



SAIT

100 1916
2016



Introduction [cont'd]



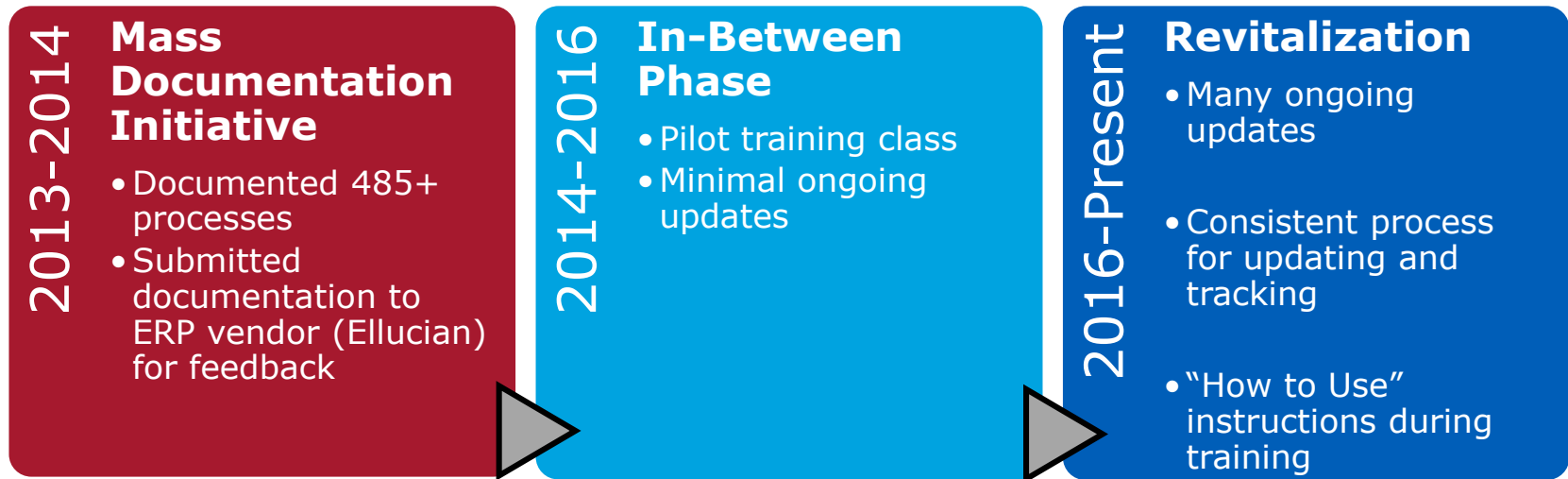
Office of the Registrar (OTR)

- 68 employees spread across several different teams
 - Management
 - Administration
 - Admissions
 - Advising
 - in-person, email, phone & chat
 - Learner Records
 - Scheduling



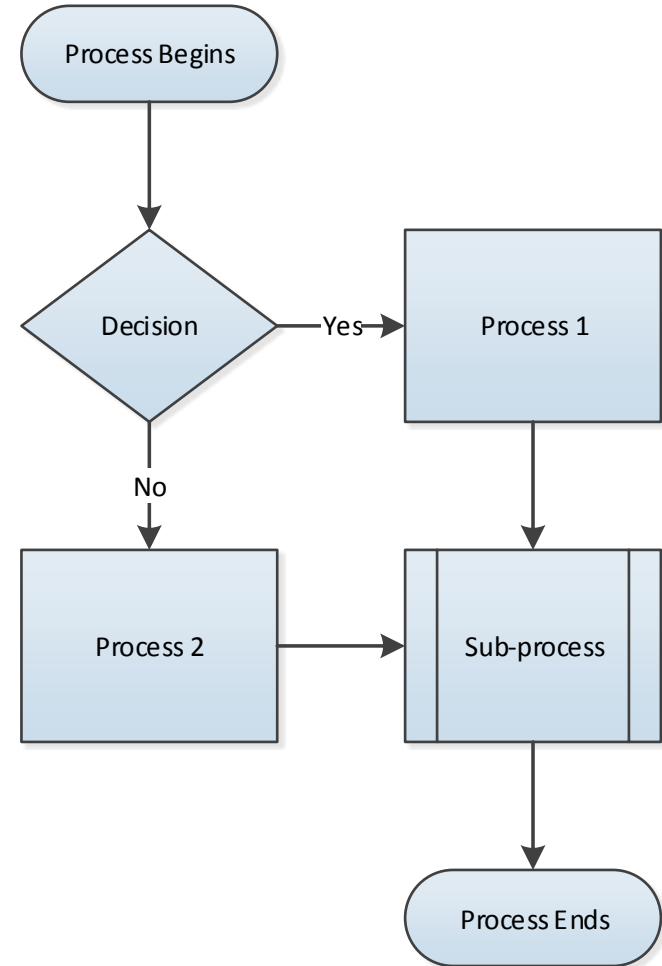
Process Documentation

Evolution



Mass Documentation Initiative (2013-2014)

- Initiative to document all business processes in a consistent format (Microsoft Visio "map" with corresponding details in Word)
- Various OTR employees involved in writing the documentation
- Minimal formal instruction on how to properly document using Visio



In-Between Phase (2014-2016)

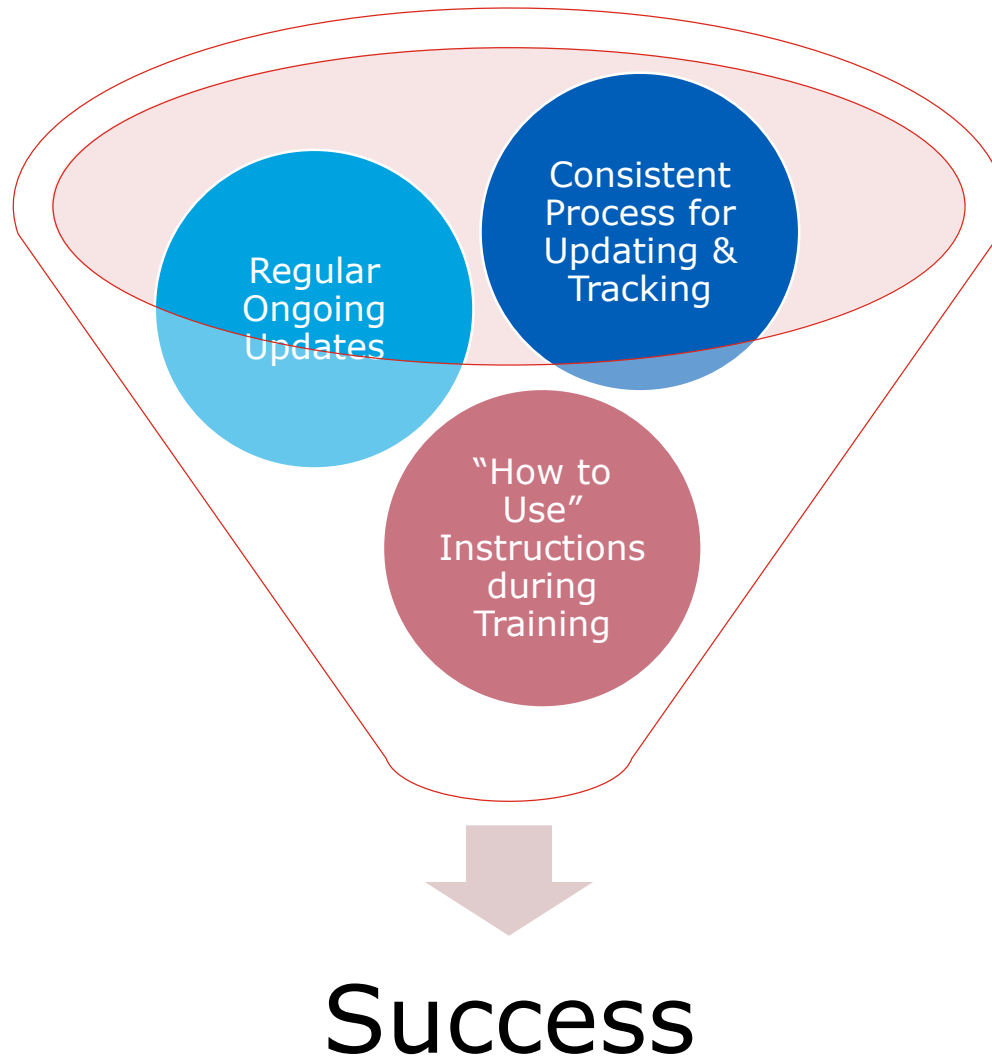
Pilot Training Class

- Replaced all existing training materials with the new documentation
- Not all trainers were on the same page

Minimal Ongoing Updates

- Outdated information
- Duplicate versions

Revitalization (2016-Present)



Lessons Learned

- Having a documentation model does not mean that it will automatically be embraced and/or understood by its users!
 - Training and “buy-in” of the model is very important
- Having the right people documenting and reviewing is crucial for success
 - Combination of “laypeople” and Subject Matter Experts
- Simple tips and tricks can go a long way
 - Example: Hyperlinks within Visio



Training

The “Champion” Model

Case Study: MyTradesecrets (MTS) Apprentice Registration



- Utilized champions (Advising staff) to deliver training to the rest of the department on the brand-new registration processes for apprentices
- Champions spent several hours being trained and vetting documentation before assisting with the training plan and ultimately training their colleagues
- Champions are now subject matter experts on the processes who assist their colleagues with troubleshooting and analyzing registration reconciliation reports

Connection to Employee Success



The Champion

- **Development opportunity**
 - Presentation skills
 - Troubleshooting capabilities
- **Accountability**
 - Responsible for others' success
 - Reflected on themselves
 - Support network
- **Depth of knowledge**
 - Capability to investigate issues and resolve
 - Subject matter expert pool increased

The Trainee

- **Delivery style met needs**

- Small training groups enabled more personal attention
- Opportunity to practice beneficial
- One-on-one coaching helpful

- **Transition of new process**

- Change was manageable
- Knew where to seek assistance – either documentation or their champion

- **Resource availability**

- Refer to Visio frequently as a guide
- Immediate support from champions when needed

The Supervisor / Management

- **Engagement**

- Enabled a culture of caring for one another
- Created resource materials to support the work
- Created growth and learning opportunities

- **Increased quality**

- Understanding the process
- Knowing how to self-check / validate

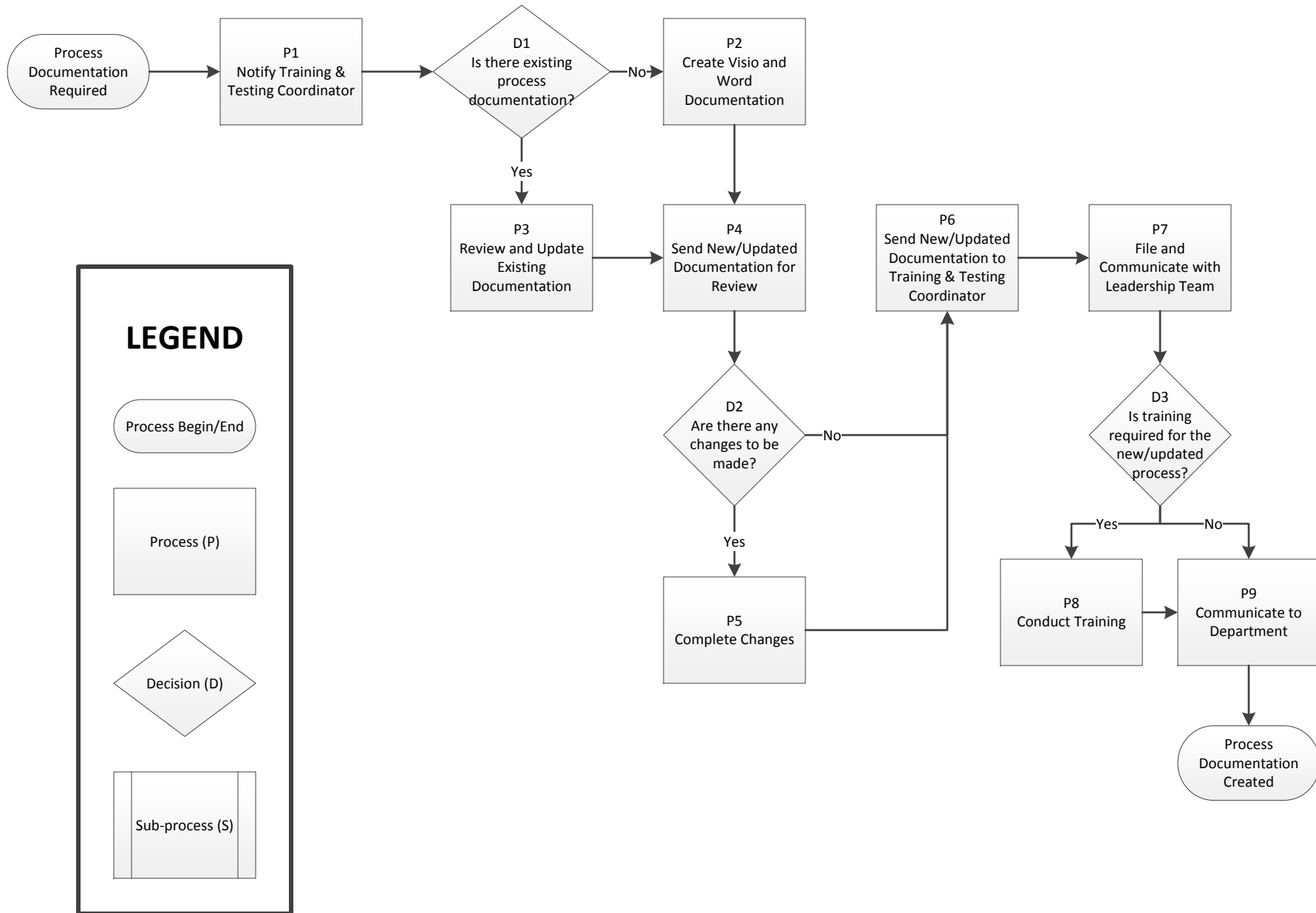
- **Succession planning**

- Diversify the SMEs across the department
 - Not only the senior members of staff
 - Not only leadership members



Questions?

Documentation Process



[NAME OF INSTITUTION]

Documentation Process

[Subtitle]

[Author]

[Date]

Reviewed by xxx

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This document describes how process documentation can be written and reviewed within the Registrar's office. Typically, most process documentation is written by customer service representatives in the department (CSRs), as assigned by their Team Leader (TL), and in conjunction with the Training & Testing Coordinator (TTC).

Processes (P's)

P1 – Notify Training & Testing Coordinator

The Training & Testing Coordinator (TTC) maintains a master index of all process documentation in the department. Before writing documentation, notify the TTC which process you will be working on, so that there is no duplication of effort.

P2 – Create Visio and Word Documentation

Using the templates provided, map out the process using Microsoft Visio, and write the corresponding step-by-step details in the Word document. Ensure that all steps in the Visio diagram are labelled with a header (P1, D1, etc.) to make the Word document easily navigable.

The Visio and Word documents may be created together, or it may be helpful to create the Visio process map first, and then fill in the corresponding details after. Before creating the Visio diagram, some users find it helpful to use post-it notes or pencil and paper to draft the process flow.

Best Practices/Tips

- Use the [Microsoft Visio help page](#) for tips on basic functionality in Visio.
- Ensure all relevant details for performing the process are included, along with screenshots, as necessary. A layperson should be able to read the documentation and follow it through to the end. It is important to use concise language in order to communicate clearly.
 - **NOTE:** All personally-identifying information in the screenshots (such as student ID numbers and/or names) should be redacted from the images in order to comply with FOIP requirements.
- Before the Processes section in the Word document, include a brief 2-3 sentence description of the process in order to provide context for a user. Include information such as why the process is done, when it is performed, and by whom.
- If there are any S's (sub-processes) referred to in the document, include a short description of the sub-process as well as the full name of the sub-process in the Word document. For example:

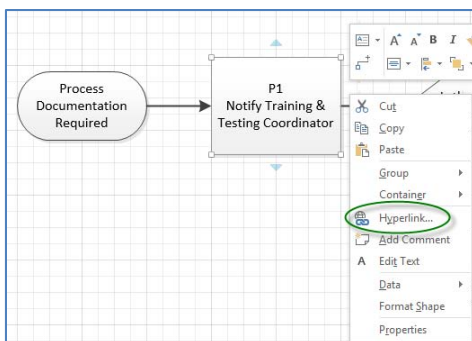
S1 – Verifying/Updating General Person Information

Refer to this process in order to verify and update the student's personal information before completing their registration.

- Adopt a consistent naming convention for the process documentation. For example, if there are many processes related to a specific function, it may be helpful to include the name of that function at the front of each name, so all related documentation stays filed together in a folder.
- Ensure that all labels for processes (P's) begin with a verb, and make process/decision descriptions as clear and concise as possible.
- Ensure that a user will be able to answer all decisions with a clear Yes or No answer. If this is not the case, wording may need to be changed in either the processes, decisions, or both.
- Once the Visio diagram has been drafted, check the diagram to ensure that there are no errors with the connectivity and flow (shapes not connected to arrows, etc.).
 1. Go to the “Process” tab at the top of Visio
 2. Click “Check Diagram”
 3. If there are any errors with the diagram, a description of each error will appear at the bottom of the screen.
- If desired, create hyperlinks between the Visio document and the Word document to help users navigate the documentation. It is recommended that this is done when the documentation is ready to be finalized.

How to Create Hyperlinks in Visio 2013

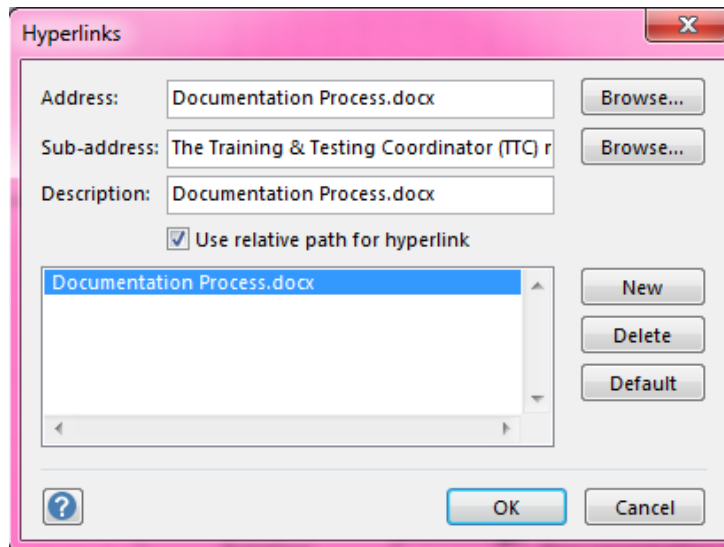
1. Make sure the Visio and Word document are saved in the same file location.
2. In Visio, select (click) the shape that you would like to add a hyperlink to.
3. Right-click and select “Hyperlink.”



4. In the dialog box that appears, enter the following information. Make sure the “Use relative path for hyperlink” box is checked off – this allows the hyperlinks to stay functional between a Visio and a Word document if both files are moved to a different location in the future.
 - a. **Address:** browse for the Word document file, or enter a web URL.

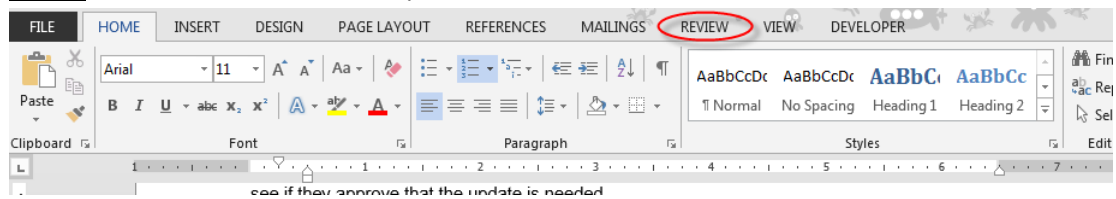
- b. **Sub-address:** enter an excerpt of text that appears on the exact place of the Word document/webpage that you would like to navigate to. For example, if the hyperlink is for P1, copy and paste the first few words of the content in P1 from the Word document.
- c. **Description:** type a name for the hyperlink, if desired (this field will default to the name of the file indicated in the Address field).

Click OK.

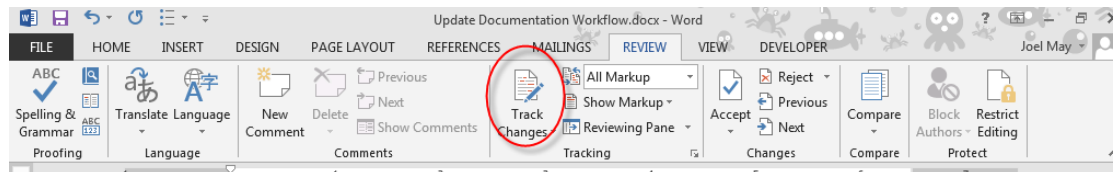


P3 – Review and Update Existing Documentation

1. Save the existing documentation as a second version; **do not overwrite the original documentation.** For consistency, keep the file names the same, but add “v2” to the end of the names.
2. Track changes for the documentation.
 - a. **Word:** select REVIEW from the top ribbon in the Microsoft Word document.



Select Track Changes.



- b. **Visio:** Visio does not have a “track changes” feature like Word does; however, you may place comments onto the diagram about what has changed.
 - i. **Visio 2013:** right-click on the diagram step that has changed, and click “Add Comment.”
 - ii. **Visio 2010:** Select “Review” from the top ribbon, and click “New Comment.”

P4 – Send New/Updated Documentation for Review

Once the process has been documented in Visio and Word, it should be sent to another staff member for review. If the process/changes were drafted by an inexperienced staff member, it should be reviewed by someone with more experience, and vice-versa. This is to ensure that the perspectives of both types of staff members (experienced and new) are reflected in the process documentation. Some processes may require review by a leader or supervisor, or may be sent to the TTC for review as well.

Send an e-mail to the reviewer with a hyperlink to where the Visio and Word documents are saved, and indicate that they can make suggestions on the documents with the Track Changes functionality in Word.

P5 – Complete Changes

If changes were suggested by the documentation reviewer, make the required adjustments (still using the Track Changes functionality). If you disagree with any of the changes suggested, discuss them with the reviewer and/or the team leader or manager, as appropriate.

P6 – Send New/Updated Documentation to Training & Testing Coordinator

Once the documentation is completed, e-mail the TTC and indicate the location of both the Visio and Word files.

P7 – File and Communicate with Leadership Team

Once the documentation has been written, reviewed, and sent to the TTC, the TTC will file a copy of the draft (tracked changes) documentation in an Archive folder, and will accept and finalize the changes in the master copy. Then, the TTC will log the completion of the process in the Master Index, and notify the department's Leadership Team of the new/updated documentation via e-mail.

P8 – Conduct Training

The TTC will work with appropriate individuals in the department to coordinate and deliver training on the new/updated process, as required.

P9 – Communicate to Department

The TTC will e-mail the department to inform them of the purpose and location of the new/updated process documentation.

Decisions (D's)

D1 – Is there existing process documentation?

Look within the department process documentation folders to determine if there is any existing documentation in place for the process being mapped. The TTC may be able to assist with identifying any existing documentation for the process(es) being worked on.

D2 – Are there any changes to be made?

According to the feedback provided by the documentation reviewer, are there any changes that need to be made?

- Did the reviewer agree with the steps in the process and the overall process flow?
- Are there any steps or details missing?
- Is the document complete with screenshots?
- Can the document be followed through and understood easily?

D3 – Is training required for the new/updated process?

The TTC will consult the Leadership Team to determine whether or not training will be required for the new/updated process.

Sub-Processes (S's)

S1 – Xxx

Xxx

[if any sub-processes existed in the Visio flowchart, they would be listed and described in this section, as indicated in P2]